

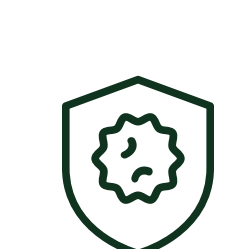
COVID-19 and the State of Consumer Loyalty.

As the economy starts to re-open, our latest COVID-19 study provides brand-level tracking of consumer sentiment regarding the importance of precautionary measures along the customer journey, and the extent that there is still work to be done to rebuild confidence in retail customer experiences.



Grocers and Pharmacies are Meeting Expectations but Gas & Convenience Brands are Falling Short.

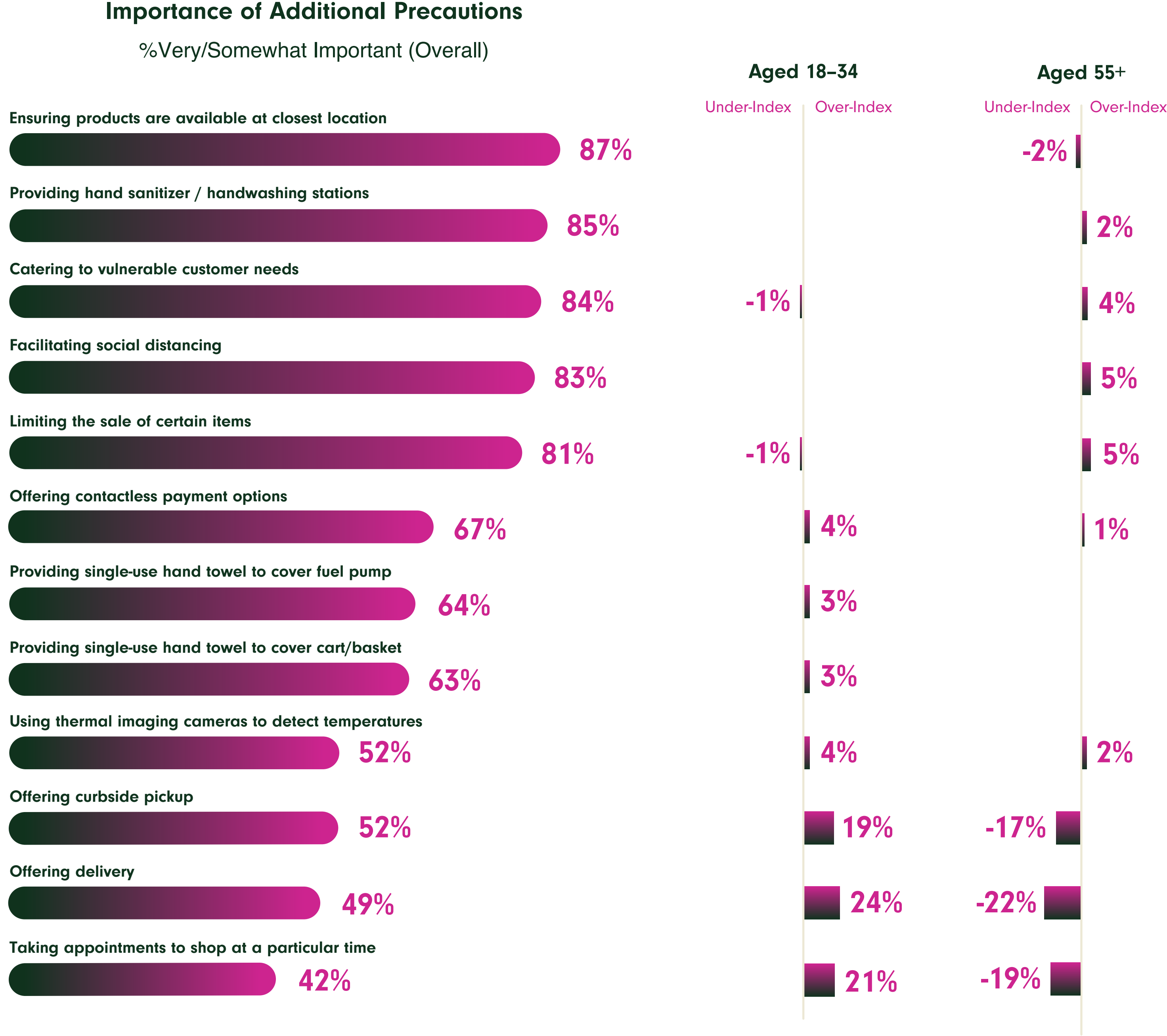
Satisfaction with COVID-19 Precautions Taken by Brands



Retailers Need to Pay Attention to Demographic Differences When it Comes to Precautions.

The importance of things like hand sanitizer and catering to vulnerable customer needs grows with the age while young consumers place greater emphasis on the off-premise customer experience: curbside pickup, delivery and shopping appointments.

Importance of Additional Precautions



What About Catering to Loyal Customer Needs?



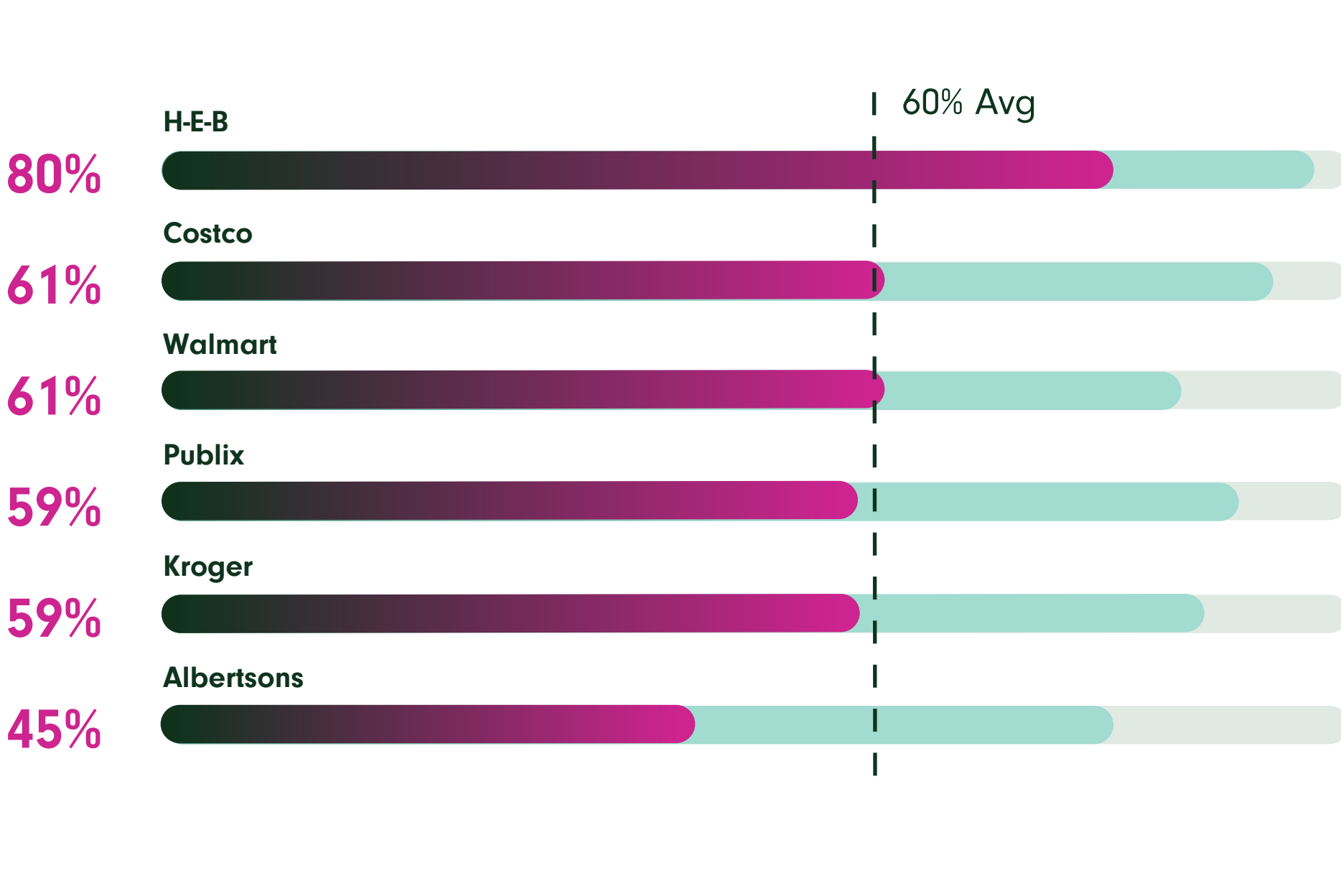
In this moment, only 45% customers find rewarding loyalty important. But as consumer confidence is restored, loyalty will return to its important role of enabling experiences that treat best customers best.

When it comes to consumer satisfaction with precautions, how do brands, by sector, compare to their competitor set?



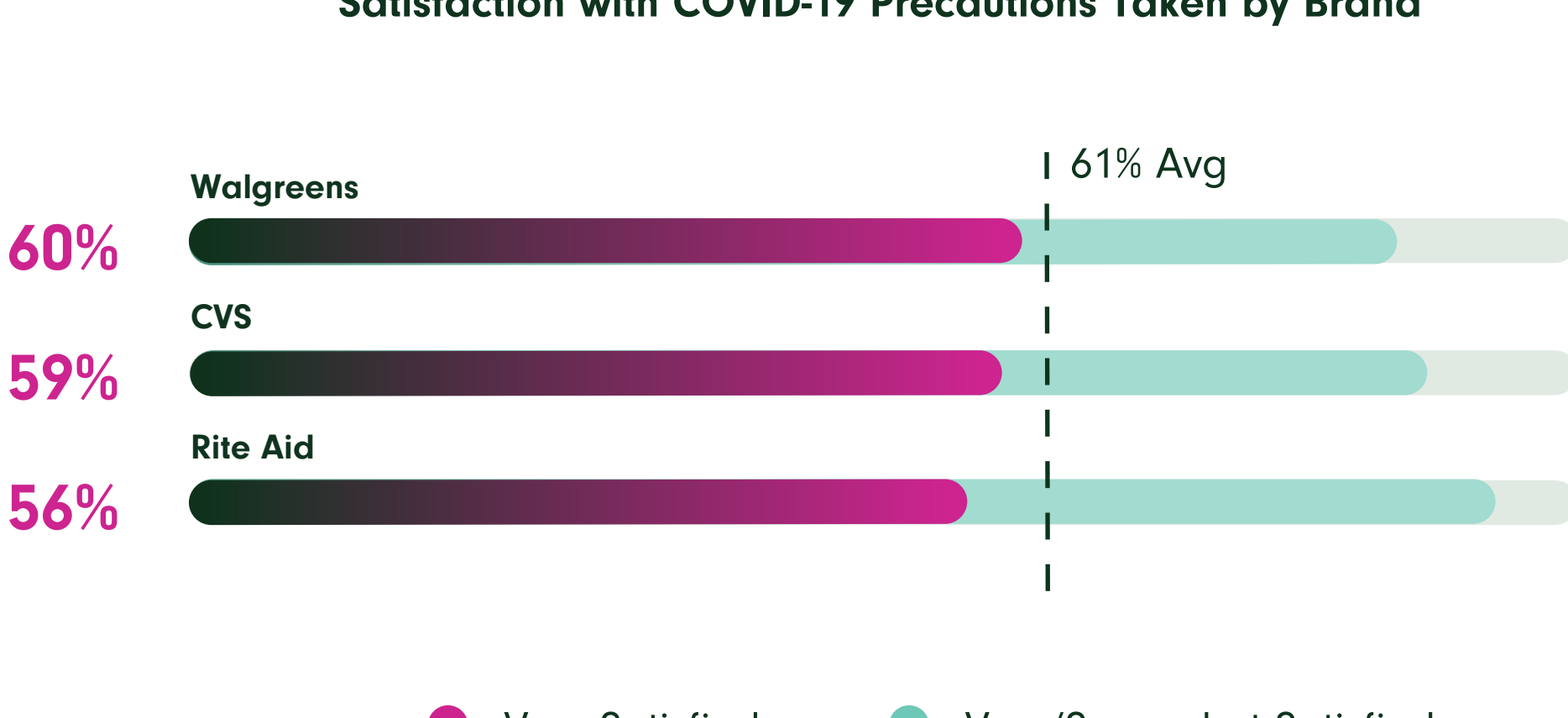
Grocery

Satisfaction with COVID-19 Precautions Taken by Brand



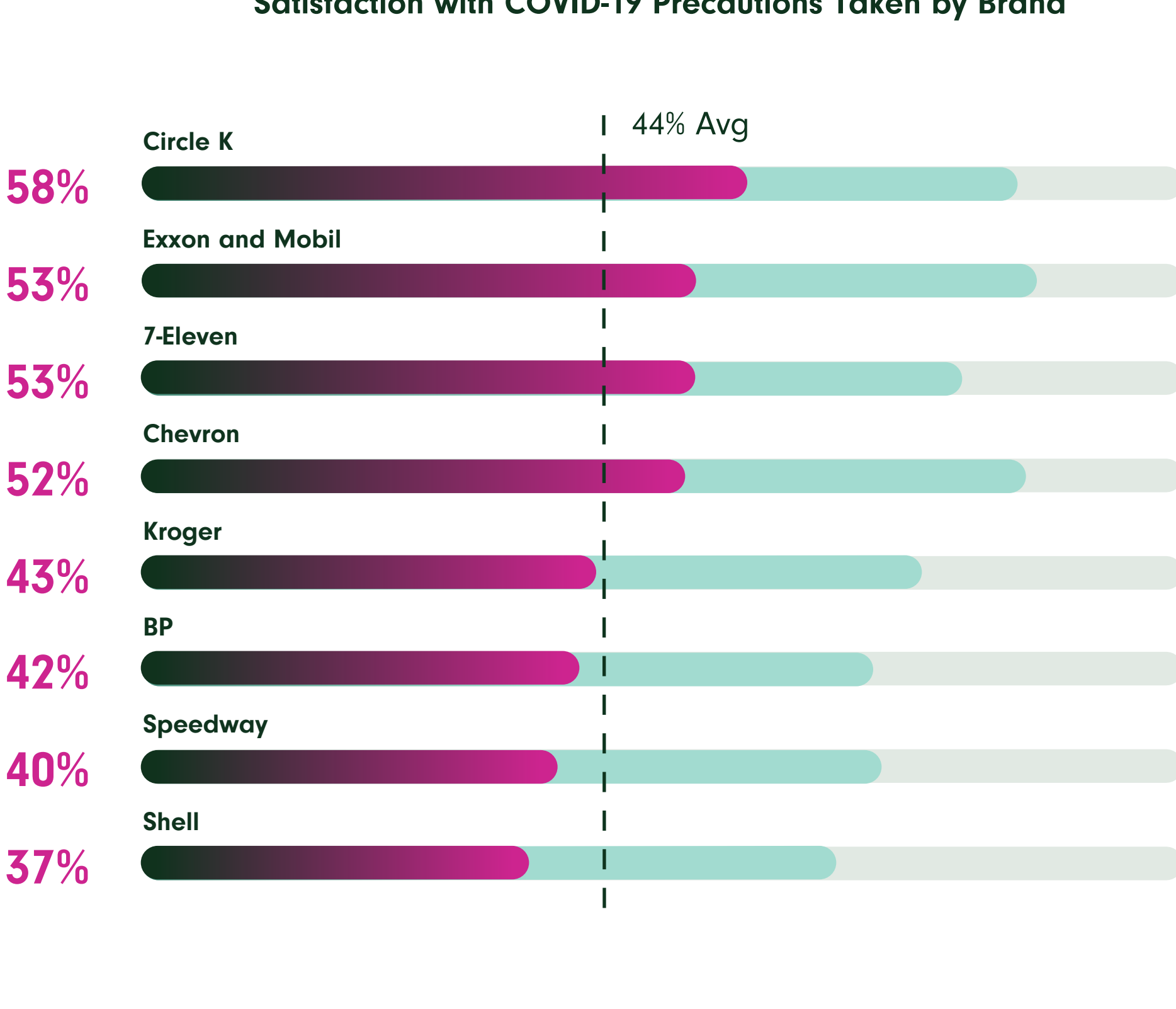
Pharmacy

Satisfaction with COVID-19 Precautions Taken by Brand



Gas & Convenience

Satisfaction with COVID-19 Precautions Taken by Brand



Source: Data provided from the Bond Data Lake, including data collected from the Bond COVID-19 State of Consumer Loyalty Pulse Survey, Wave 4: May 8th (n=1,511)